# PlanGrid
## User Guide

www.plangrid.com | support@plangrid.com

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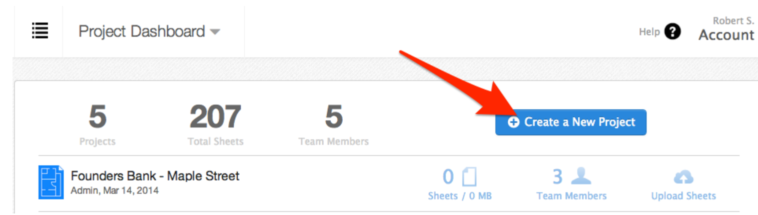
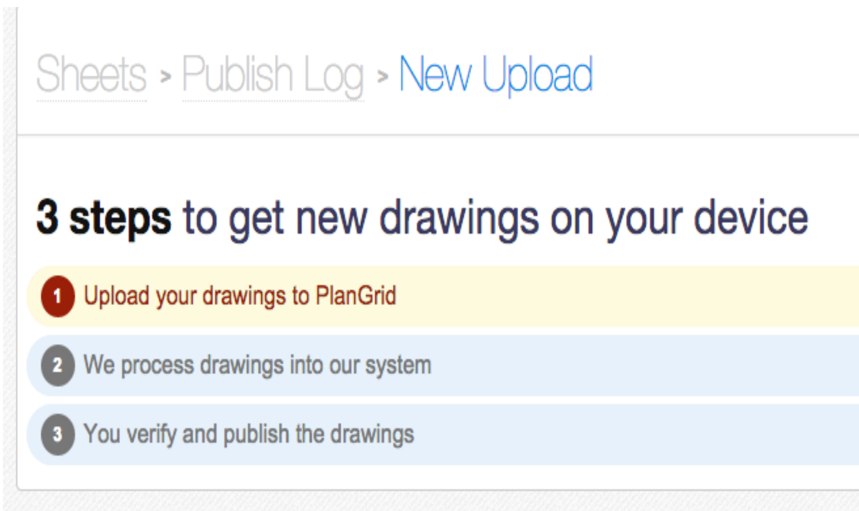
# Create a New Project

First, log in to www.plangrid.com with your computer.  From here, you can access all your projects or create a new one by clicking "Create A New Project." It also displays a summary of your account, including sheets used, number of projects, and the number of collaborators with whom you are working.




**To Get Your Drawings on PlanGrid:**

**1.** Click "Create New Project."

**2.** Upload your plans from your computer or from your cloud based service, making sure they are correctly oriented beforehand.

**3.** PlanGrid will then process your plans and email you when they are finished.

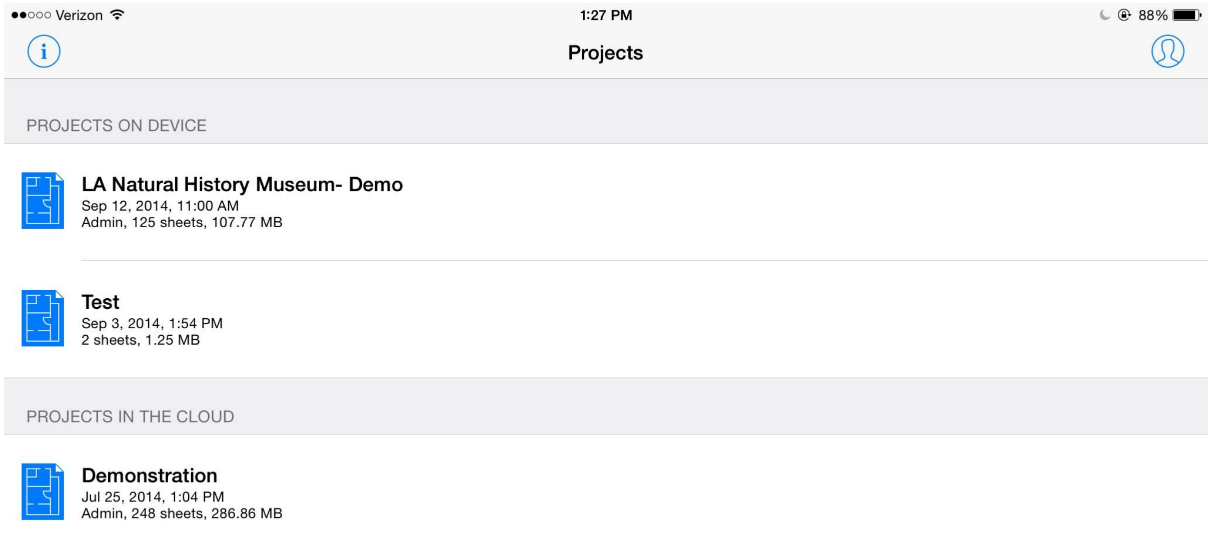
**4.** Once you receive this email, verify your sheet names and **publish** your drawings for viewing on your mobile device.

Note: Attachments such as specs, schedules, and RFIs are processed differently than plans. *See page 9 "Attachments"*

# Create a New Project con't

**To Get Your Project on Your Device:**
**1.** Download the mobile app from the App or Play Store and log in using the same email and password as online.
**2.** Tap the project you wish to download from the Cloud (you will need to be connected to wi-fi). For partial downloading on ios devices, reference page 6.
**3.** The project will begin to download onto your device. Download time will vary depending on the size of your project.

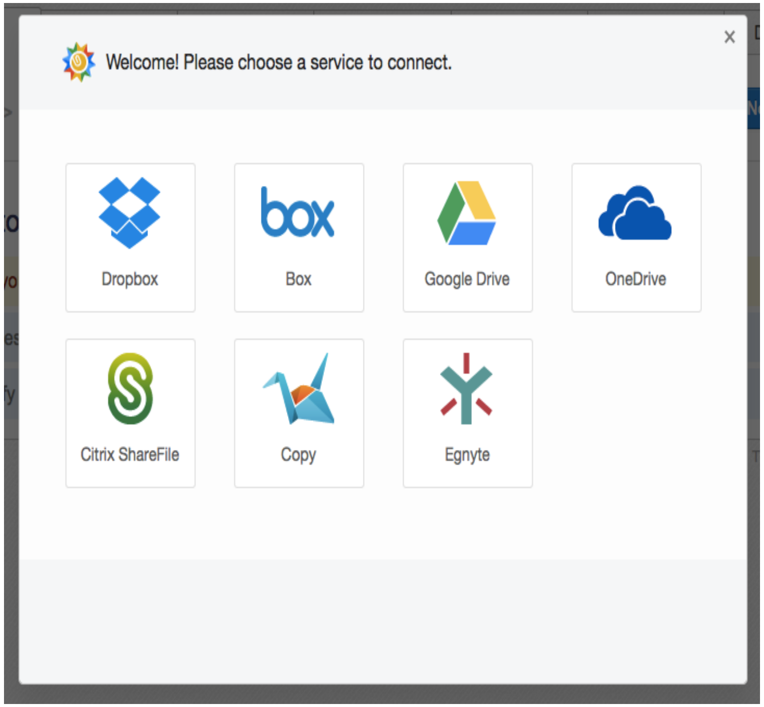
*Note*: when changes are made to the project, a red alert icon will show up next to the project that needs to be updated. Tap the project and select "Update."



# Connecting Your Cloud Storage to Plangrid

PlanGrid offers file uploading integration with Dropbox, Box, Google Drive, OneDrive, Citrix ShareFile, Copy and Egnyte. If your plans are already stored in these cloud services, connecting your cloud storage accounts to the uploader is the easiest way to load the files into your PlanGrid projects. First, in a separate browser tab, log in to your preferred cloud storage account. You can only connect your accounts to PlanGrid when you are actively logged in using the same browser.

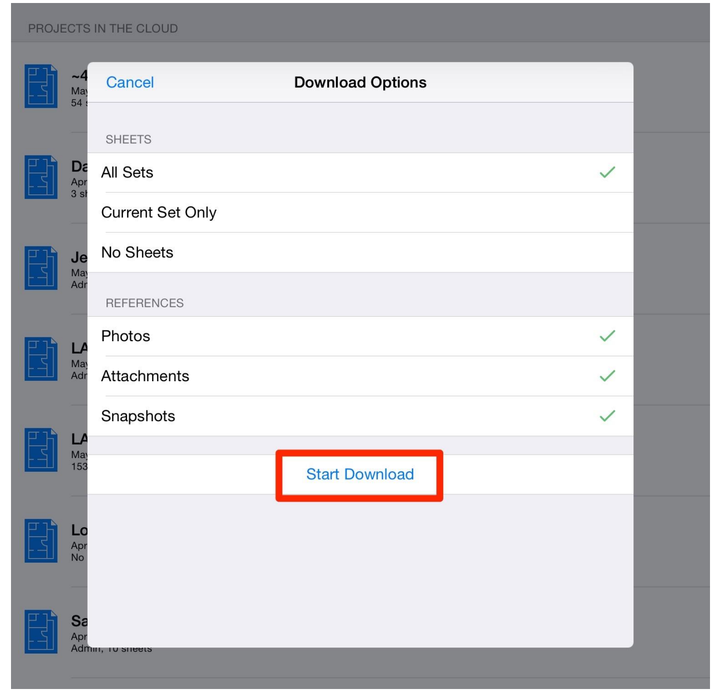
1. Open any project to the Sheets tab, and then click the blue "Upload" button.
2. When the uploader box opens, choose "Upload from the Cloud".
3. Choose the account where your files are stored simply by clicking on the icon.
4. Next, you'll be asked to sign into your preferred cloud storage system to access and upload your files.
5. To switch between connected cloud storage accounts, click the drop down menu under your email address. Click "Accounts" to return to the main window to connect or disconnect your cloud accounts.
6. To disconnect your cloud storage account, simply click on the "x" associated with that account from the main accounts window.




**Note:** This integration is only used to easily upload sheets to the PlanGrid service. Changes made to the plan files in the cloud after upload will not be automatically synced to PlanGrid. This allows Administrators to easily control what is available as a Master on PlanGrid without disrupting the way other users (outside of PlanGrid) use the Cloud storage services.

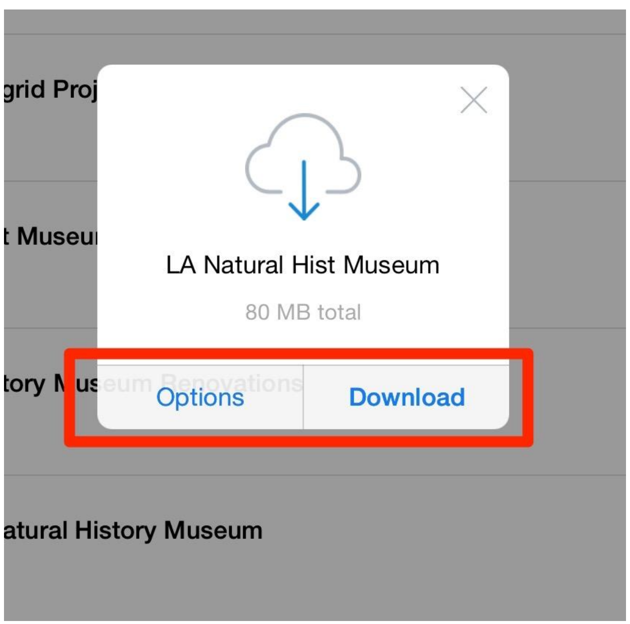
# Partial Downloading on iOS Devices

You now have more options about which project information you wish to download. Options include, current set of sheets, all of the sheets, attachments, snapshots, and photos.




**To get started**, open the PlanGrid app on your iPad or iPhone to the main projects screen. To access the download options, tap the project title.

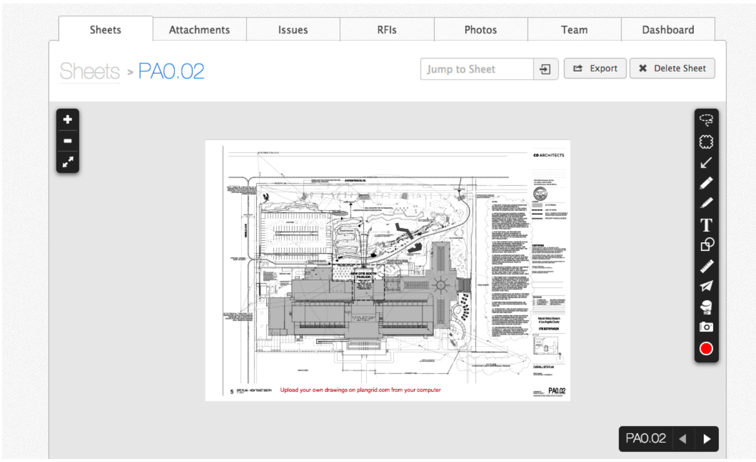
1. A box will open. To download the entire project, tap "Download". To view your download options, and download select project information, tap "Options". If you choose to download the entire project now, you will need to remove the project from the device to have advanced download options in the future.




2. Select the project information you want to download now. Anything that is not downloaded now can easily be downloaded later.
3. Once you've made your selections, tap "Start Download".

Note: You can download project attachments and snapshots without having to download any sheets. However, in order to download photos you must download *at least* the Current Set.

# Web Viewer and Web Markups




1 2 3 4 5 6 7 8 9 10 11 12

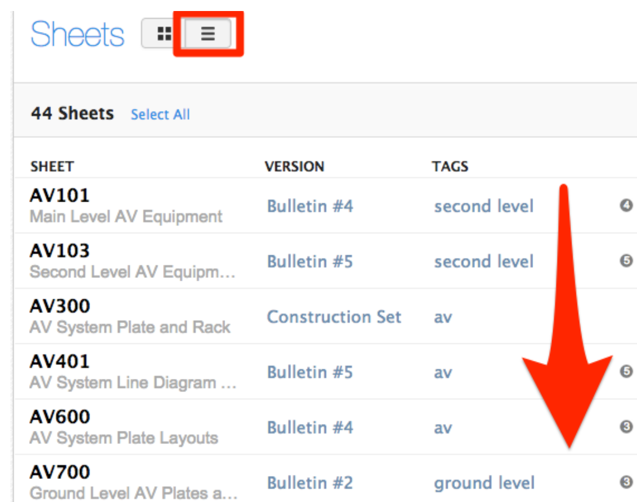
1. **Multi-select tool**
2. **Cloud:** create a cloud annotation
3. **Arrow:** create an arrow annotation
4. **Pen tool:** Create freehand annotations
5. **Highlighter:** Highlight areas of interest
6. **Text:** create text box
7. **Shapes:** create a square, circle, line, or x annotation
8. **Ruler:** take quick measurements on your plans
9. **Paper airplane:** create a hyperlink
10. **Issues:** place stamp to track project issues
11. **Camera:** pin photos to your sheet
12. **Color select**

**Viewing and Marking Up Sheets on the Web**

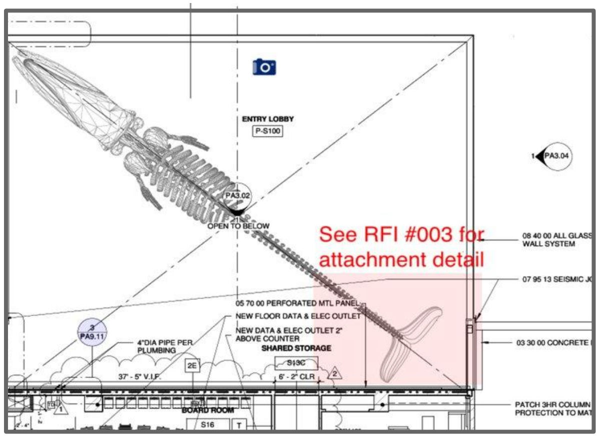
**1.** Click on the "Sheets" tab.
**2.** Click on a sheet thumbnail.
**3.** Create annotations using the tools on the right side of the viewer. Push annotations to master to share your annotations to other members of the team.

**Downloading and Modifying multiple sheets:**

**1.** Click the List View icon in the sheets tab.
**2.** Click and drag on rows to select multiple sheets.
**3.** Once one sheet is selected, use the bar that appears at the top of the list to modify tags, download sheet staple packs, or attach items to multiple sheets. *(See page 24)*



# Creating and Viewing Markups on your device




**Markup Tools on your Device**
To mark up your drawings , simply tap the appropriate icon and tap and drag on your sheet to create that markup.

Multi-select tool
Draw a cloud
Draw an arrow
Pen tool
Highlighter Tool
Insert text
Draw shapes
Add Issues stamp
Create hyperlink
Measuring tool
Photo tool
Color select

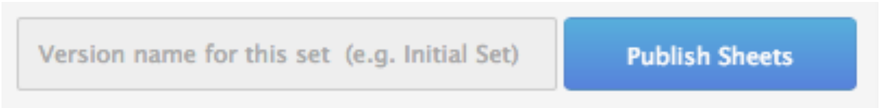
**Modified Sheets**
When a sheet has been modified either online or your mobile device, it will be marked by specific icons both online and on your device. This is what they mean:


- **Circled number:** number of versions
- **Red dot:** sheet has personal markups
- **Crown:** sheet has master markups*
- **Paperclip:** sheet has attachments

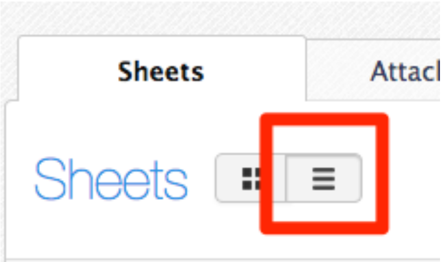
*Personal markups are annotations that only you can see. Master markups are pushed to the whole team.

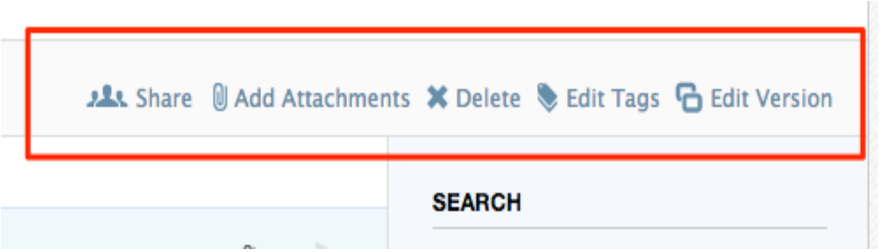
# Versions

One of the many features that sets PlanGrid apart is versioning. Versioning means we replace an existing set of sheets with your revised sheets automatically. We do this by reading the sheet name from your title block and replacing old sheets with the same name.




You will add version names during the very last stage of publishing. These names will be something like "Initial set," "Addendum 1," etc. If you are adding revised sheets to your project, you should never use a version name that already exists in your project. Version names also **should not be used to sort plans by discipline**.



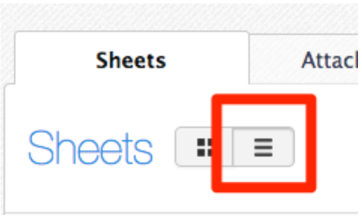




**Filter by Version**

**1.** First, click on the list view tab, if you want to download multiple sheets of a specific version.
**2.** Then, click on the version you want to view under "Filter by Version" on the right hand side.
**3.** From here you can select all the sheets in a specific version by clicking "Select All."
**4.** Once at least one sheet is selected, options to edit tags, add attachments, or edit version will appear at the top right of the list view.

# Tags

Project tags allow you to easily group and find sheets. You can group sheets by discipline, or create a custom tag.  The tags you create will be available to all collaborators on your project. Tags, not version names,  are used to sort a project by discipline.

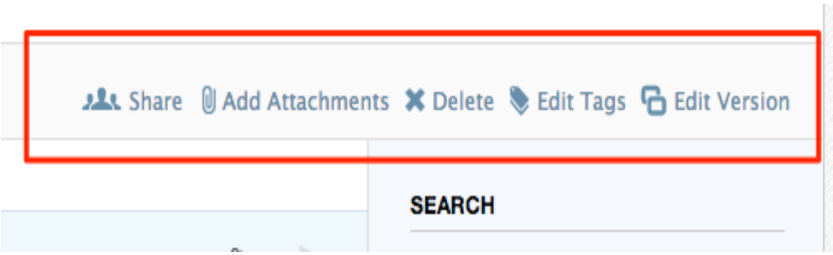


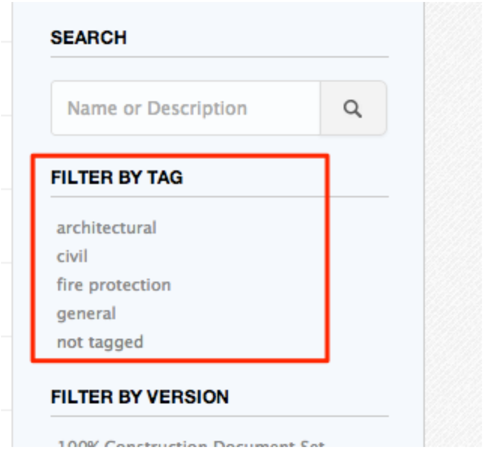

**Tags on Your Computer**

**1.** Click on the Sheets tab, and then the list view icon to show a list view.

**2.** When multiple rows are selected, the option to edit tags will appear in the top right corner of the list.  Click this option to add tags.

**3.** Tags you create online will be immediately synced to your team's tablets.




**Filtering by Tag**

**1.** In the sheets tab, click on the tag you want to view under "Filter by Tag"

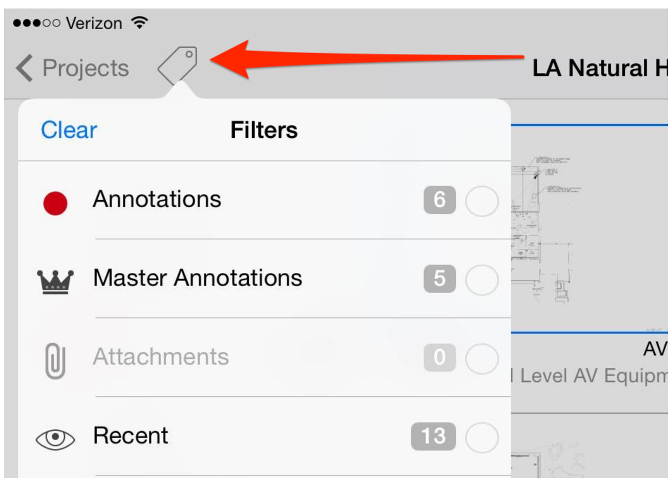
**2.** Click the List View icon to select multiple sheets.

**3.** You can edit, delete, or share these selected sheets by clicking on the icons on the righthand side.

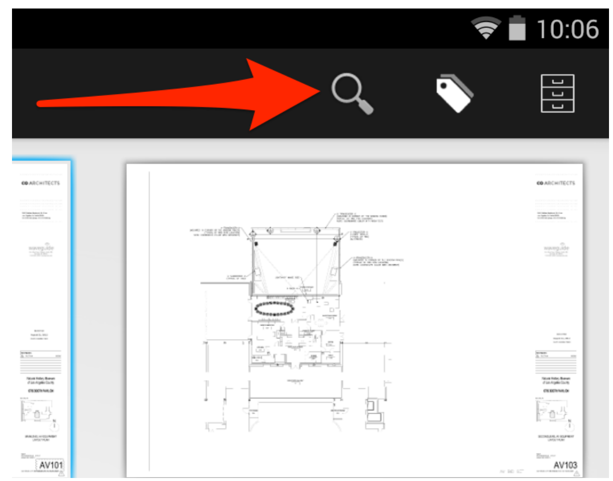
# Finding Sheets on your Device

To filter and find sheets using your iPad:
**1.** Tap the tag icon in the upper left hand side of the screen. On your Android you will find it on the right.
**2.** Tap the filter you would like to select. You can also sort by project tags and versions that you have created online.
**3.** To narrow your search, tap a filter, project tag, or version.
**4.** You can also search for sheets by name by tapping the magnifying glass in the upper right hand corner

Note: you can only filter by one version at a time.

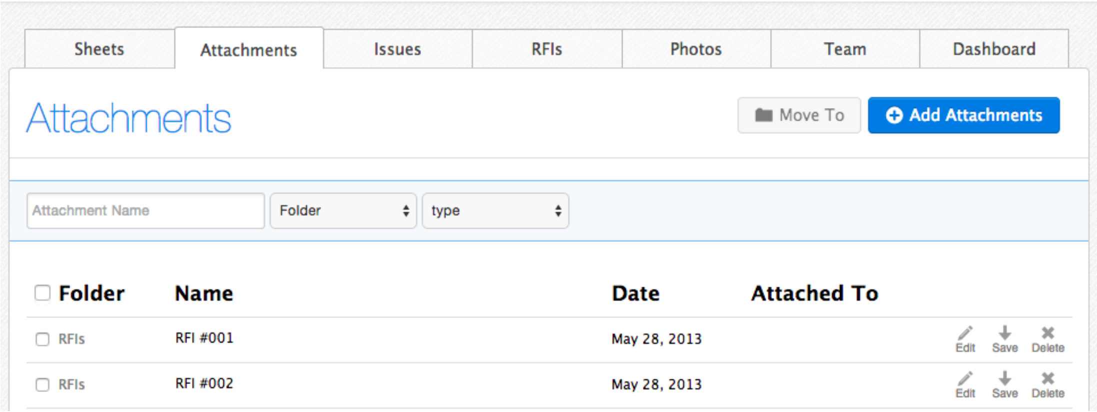



**iOS**



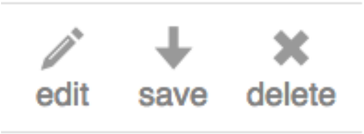

**Android**

# Attachments on the Web




**Attachments on the Web**
Attachments are any non-blueprint PDFs that you add to your project, such as Specs and RFI's. You have unlimited storage for attachments.

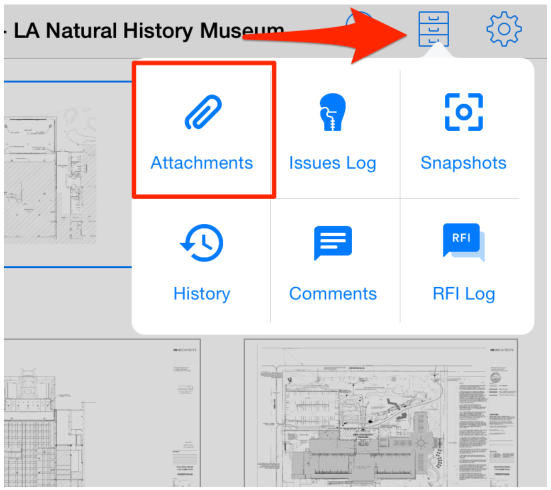
To view your attachments online, click on the "Attachments" tab. From here, you can upload attachments by clicking on "Add Attachments." You have the option of searching for attachments by name, or sort them by folder or type. You can select multiple attachments, then click "Move To" to move attachments to different folders or delete them.



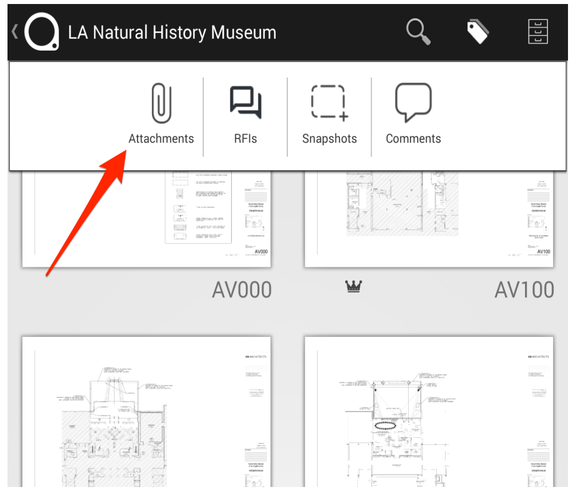

You can also quickly edit, save, or delete an attachment by clicking the appropriate button. To view, click "Save".

# Attachments on Your Device

To view attachments on your device:
**1.** Tap the file icon in the upper righthand corner of grid-view or sheet-view, and select “Attachments”.



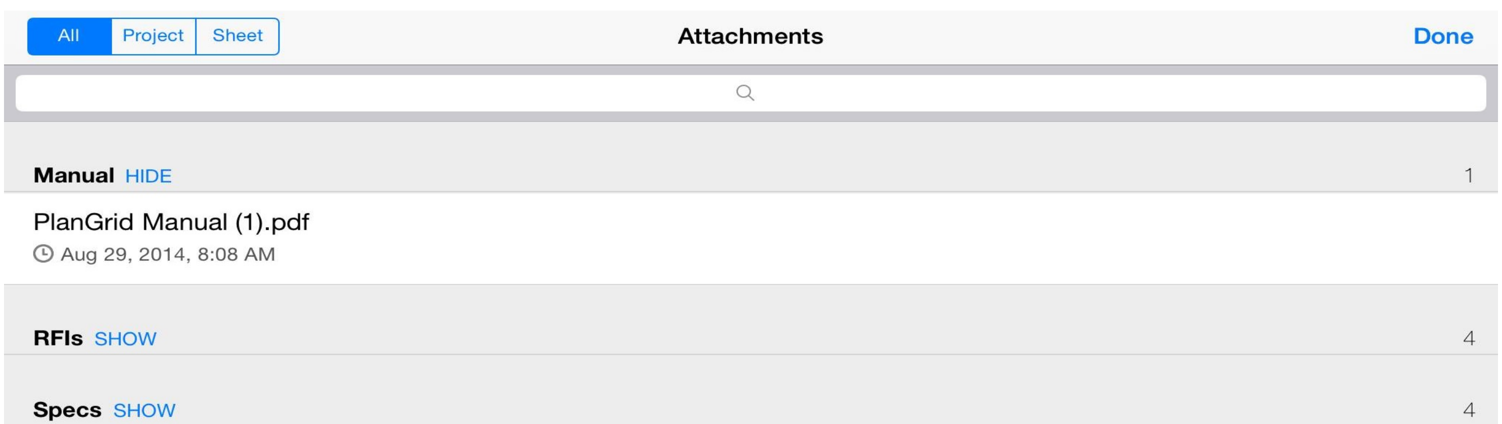

**iOS**




**Android**

**2**. Once in the Attachments menu, you can scroll through to select your attachment. On iOS you can tap “Hide” to show only the accompanying folders, or “Show” to show all of the attachments within those Folders *(See Below)*.

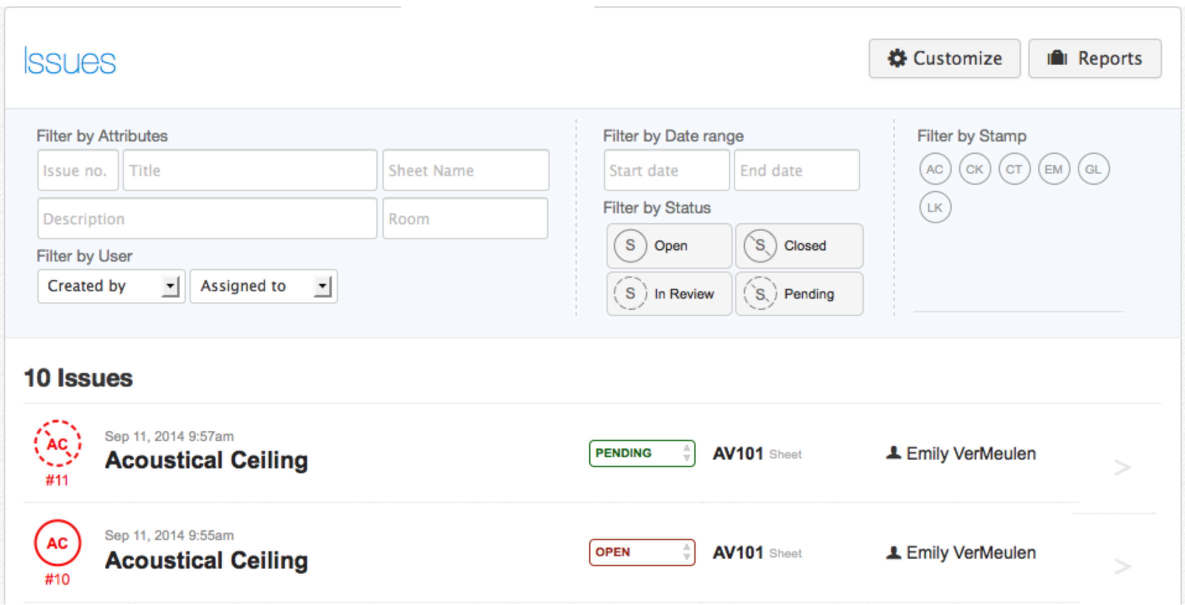
**3**. To open an attachment, tap the title. On iOS the attachment will open right in the app. On Android,  tap the title, then chose the program you would like to open the attachment in.



# Tracking Issues on the Web

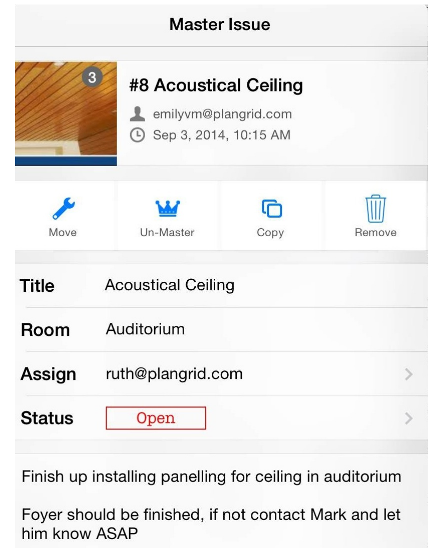
Stamps are a great way to keep track of issues in your project. From the “Issues” tab of your project, you can filter stamps by attributes, user, date range, status, and stamp. You can create custom stamps by clicking “Customize.” You can also export Issue reports by clicking “Reports.” Reports can be saved as PDF or CSV files, emailed, directly uploaded to Box or DropBox, or downloaded to your computer.

*Note*: You can only create Issue stamps on the iPad and website.



# Issue Tracking on Your iPad


To add a stamp:
**1.** Tap the boxing glove icon and tap the sheet where you would like the stamp placed.
**2.** Move your stamp to another location by tapping on it and tapping "Move"..
**3.** From this box you can also add a photo, room number, and description to the stamp.
**4.** You can assign the punchlist stamp to any collaborator, add a description and room number, just by tapping on that field.
You can also change the status, which will change the appearance of the stamp on the sheet (*see below*).





Open


In Review

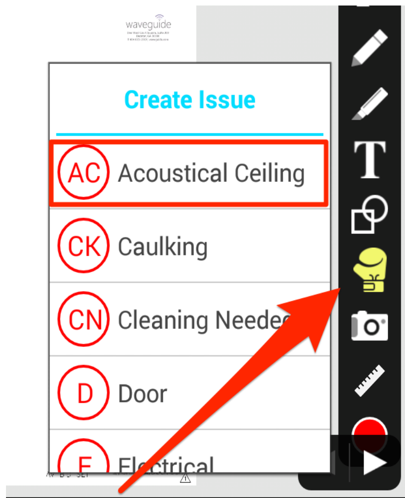
Pending

Closed

# Issue Tracking on Android

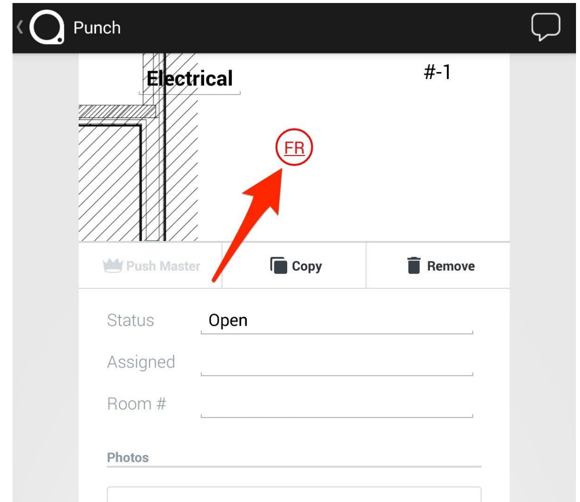
**1.** To add a stamp, tap the boxing glove.
**2.** Choose the stamp, then place the stamp on the sheet in the preferred location.

**3.** You can add a room number, photos, description and assign it to a team member by tapping on each field.

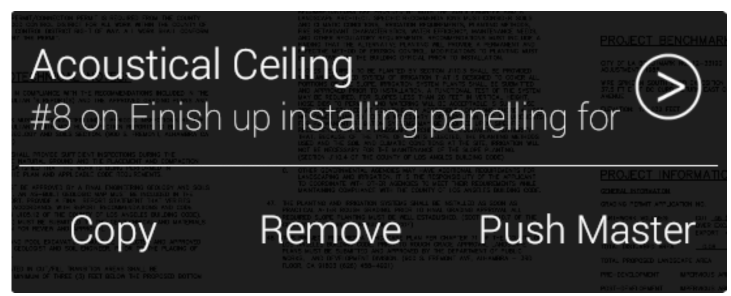



**4.** To edit the status, click on that field and choose the preferred status.

**5.** Once the stamp is placed, you can edit any of the information by tapping the stamp, then tapping the “>” on the right side. You can also change the status, which will change the appearance of the stamp on the sheet (*see page 15*).

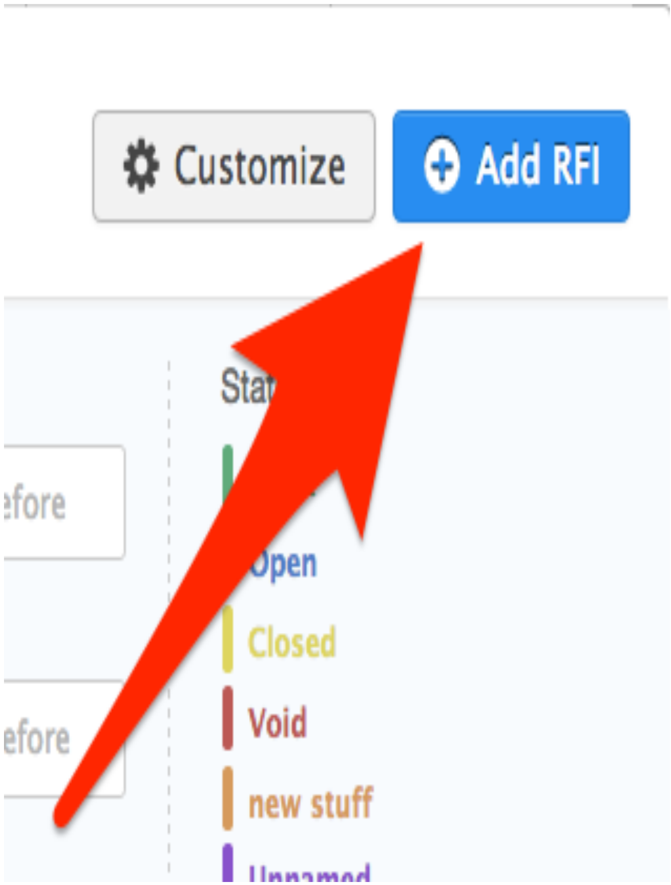



**6.** You can edit the stamp code by tapping on the stamp and changing the 2 digit code.

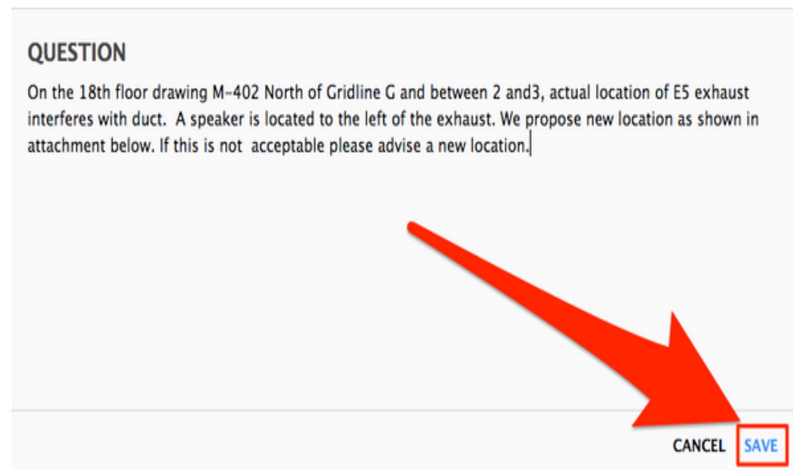


# Creating RFI's with PlanGrid

PlanGrid now has the ability to generate RFIs right from the website! To do that, log into the project through plangrid.com and click on the RFI tab. **To create a new RFI:** Click "Add RFI".



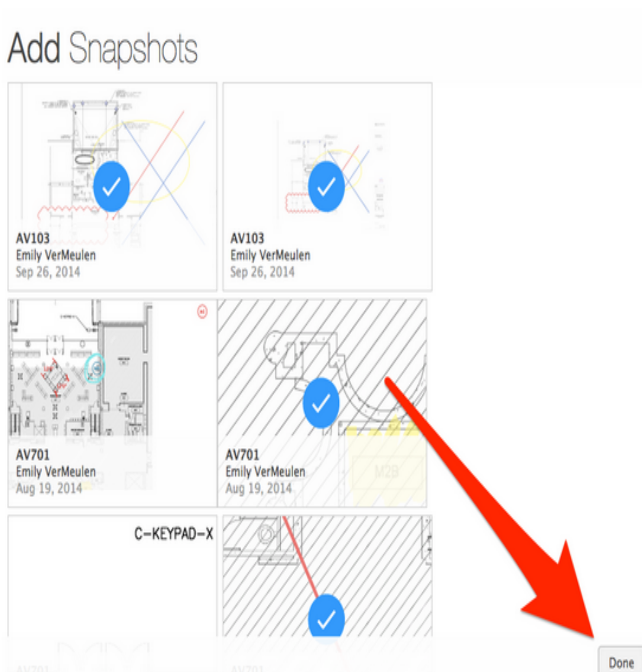

To edit the Title, Question, or Answer fields, first click "Edit". When you are finished editing that field, click "Save". Please note: if you do not click "Save" before leaving the page your changes will not be saved to the PlanGrid cloud.




Collaborators and Admins have the same rights when it comes to creating and editing RFIs. To ensure accountability and track changes, PlanGrid will automatically record all edits and updates made to your RFIs under the RFI History.

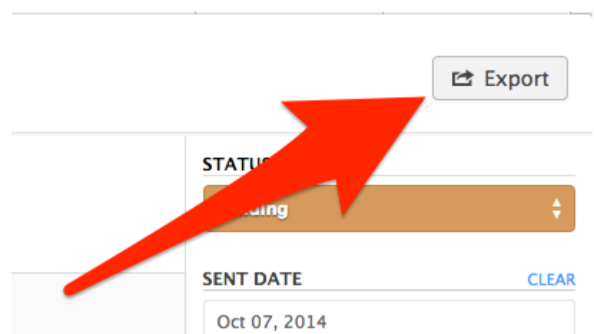
# Creating RFI's with PlanGrid Cont'd

To add References to your RFI, click "Add", then select from your project's progress Photos, Snapshots, or Attachments. Select the images or attachments to add, then click "Done".
Use the options on the right side to set a status, a sent date and due date, as well as assign it to one or multiple team members.




**To print or email:**
To send your RFI to a colleague who doesn't necessarily use PlanGrid, click "Export".

An email box will open. There you can choose your recipients and add a personal message. To download the RFI to save or print, click "PDF" under "Attached".

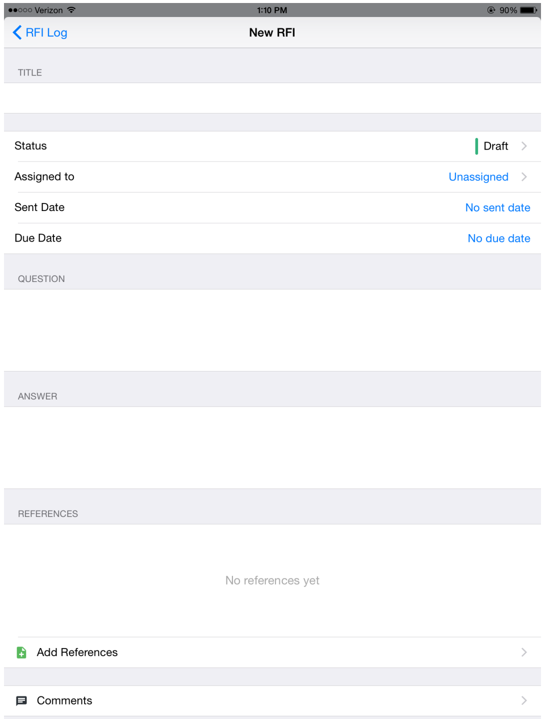


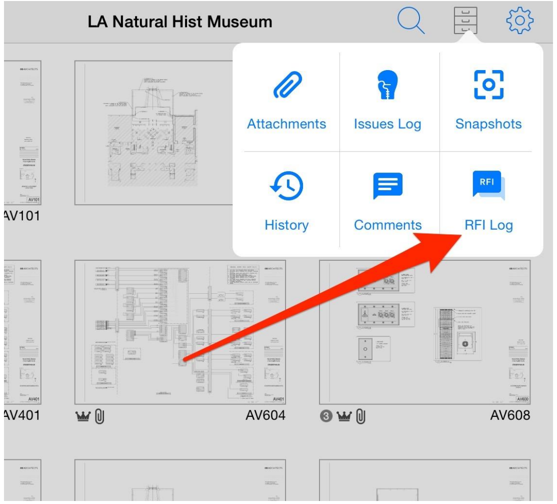
# Creating RFIs from the Field

**To View, Edit, or Create an RFI:**

1. To access the RFI log, **tap on the File Cabinet**, and **choose "RFI"**(Android) or **"RFI Log"**(iOS).
2. You'll be taken to your RFI Log. To open an existing RFI to edit or view, **simply tap the RFI title**. To **create a new RFI, tap the "+"**(Android) or **"New RFI"**(iOS).

Your new RFI will contain all the fields necessary including title, status, assigned team members and sent and due dates. And of course space for a question, answer and references.

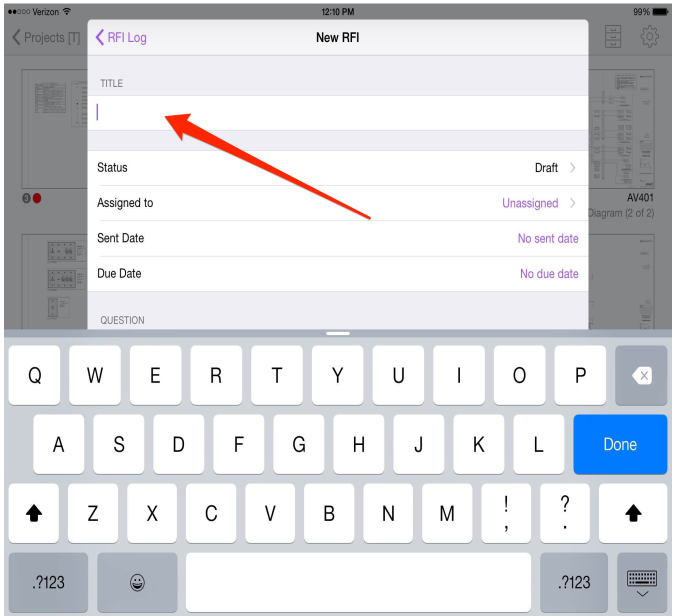



iOS


Android

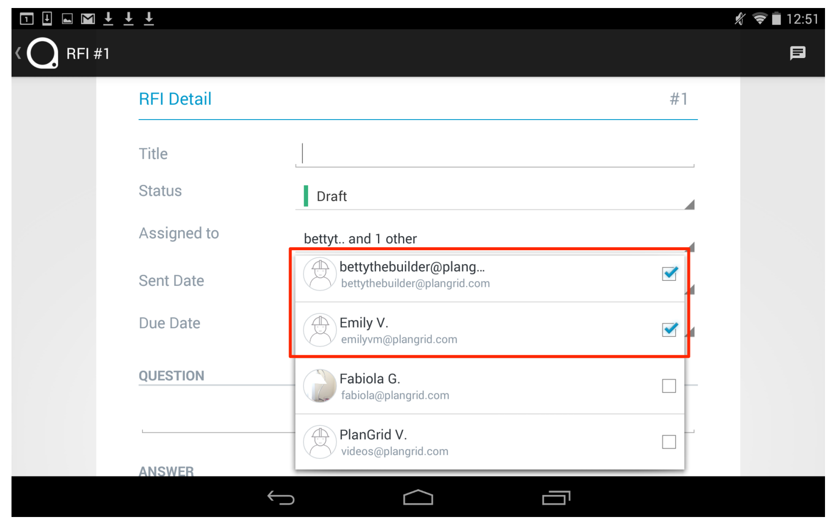
# Creating RFIs from the Field Cont’d




3. To edit the RFI information, **tap into the field**.
4. To **edit the submitted or due dates**, tap into the field and choose your preferred date.

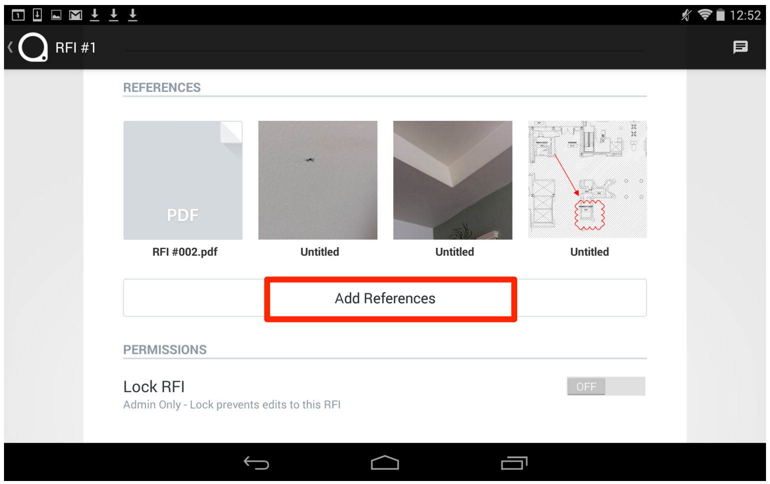
- **On Android:** Use the date scroll or calendar options to choose the date, then **tap "Done".**
- **On iOS:** Use the date scroll to find the correct date, and then **tap "Set Date".**

5. **Assign the RFI** to as many team members as necessary by tapping the "Assignee" field, and then **checking the names** of the preferred team members. They'll receive an email notification that they've been assigned an RFI.

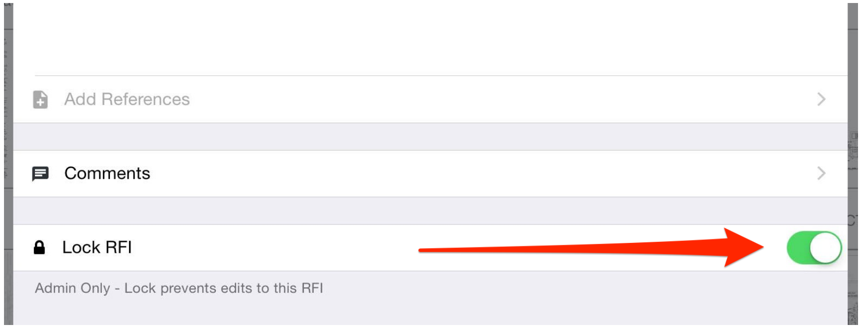


# Creating RFIs from the Field Cont’d

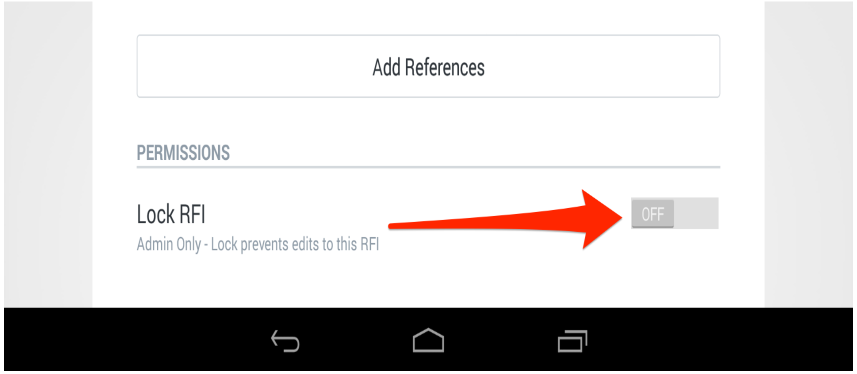
7. Select the references, and **tap "Add Selected"** (Android) or **tap "Add References"**(iOS).




8. Because admins and collaborators both have the same rights when it comes to creating and editing RFIs, **locking and unlocking allows you to secure your information** and prevent any unwanted changes. Only project admins can lock and unlock RFIs.




**iOS**

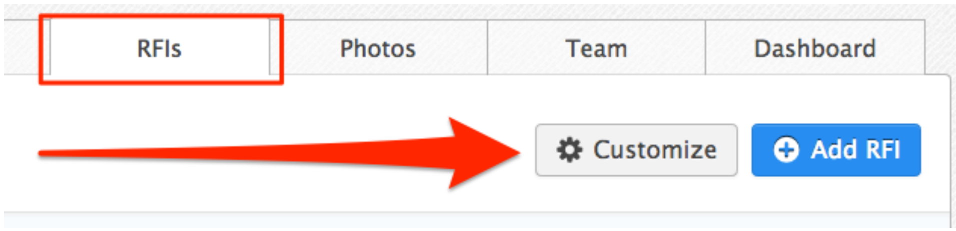



**Android**

9. Use the Comments feature to communicate with your team about the RFI.

- **On Android:** Simply tap the comment icon in the upper right hand corner of the RFI, and type in your message.
- **On iOS:** Tap "Comments" below your references to open the comments board.

# Customizing RFI's in PlanGrid



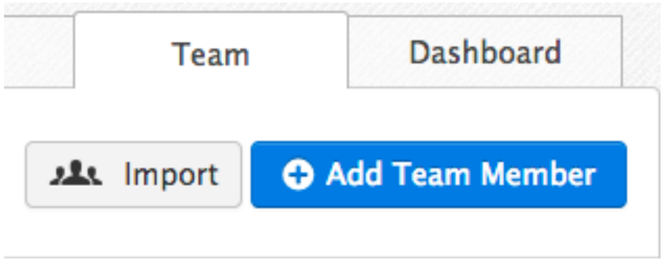

**To create a custom status:**

Open the RFI tab in your project, and click on "Customize".

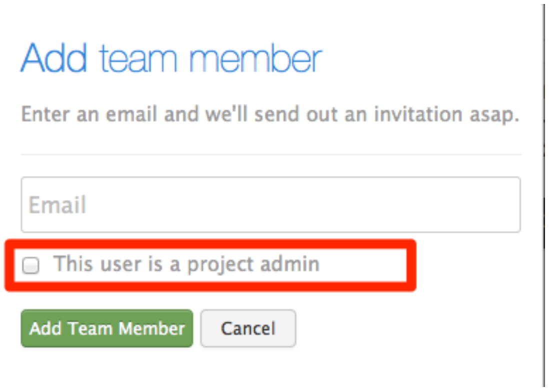
Next, you will see color coded status labels. To add a custom status or change the name of an existing status, click "Edit".

# Sharing Projects with Your Team

PlanGrid has two different permissions levels: administrators and collaborators.  Sign in online and click on the "Team" tab in your project to add users and manage your project team.. From here, you can view the administrators and collaborators on your project (*see page 21*) , as well as people you have invited but who have not yet accepted the invitation.








**To add a team member**

**1.** Click "Add Team Member"

**2.** Input the email of the user  you want to add.

**3.** If you would like to give the team member admin rights, make sure that you check the box that says "This user is a project admin."

**4.** Once you send an invitation, the user will be added as a team member if they already have a PlanGrid account. If not, they will need to create one, and their status will remain as "Invited" until they do so.

**5.** You can also import team members from other projects by clicking "Import".

# Admins vs. Collaborators

**Admins**

- Can upload drawings
- Can delete sheets
- Can delete projects
- Can add users
- Can assign issues
- Can change issue's status
- Can archive and permanently delete master punch items
- Can push annotations to master
- Can edit sheet name, description, and version
- Can edit project tags
- Can attach documents
- Can share master Annotation Layers
- Can lock and unlock RFI's

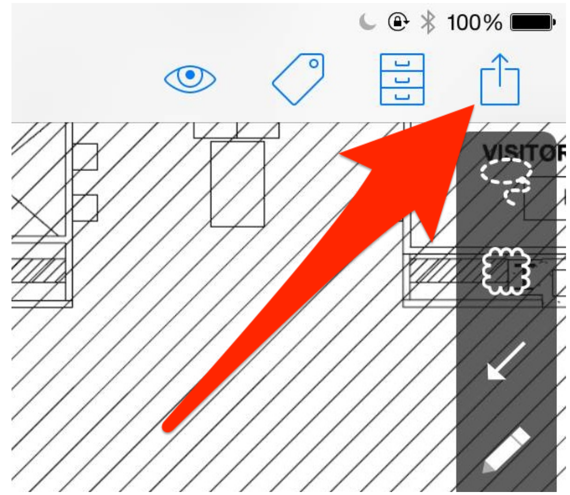
**To change permissions:** Click the gear icon under their name, and check or uncheck the box that appears to give or remove admin rights respectively.
**To remove a user**, click the trashcan icon next to their name.

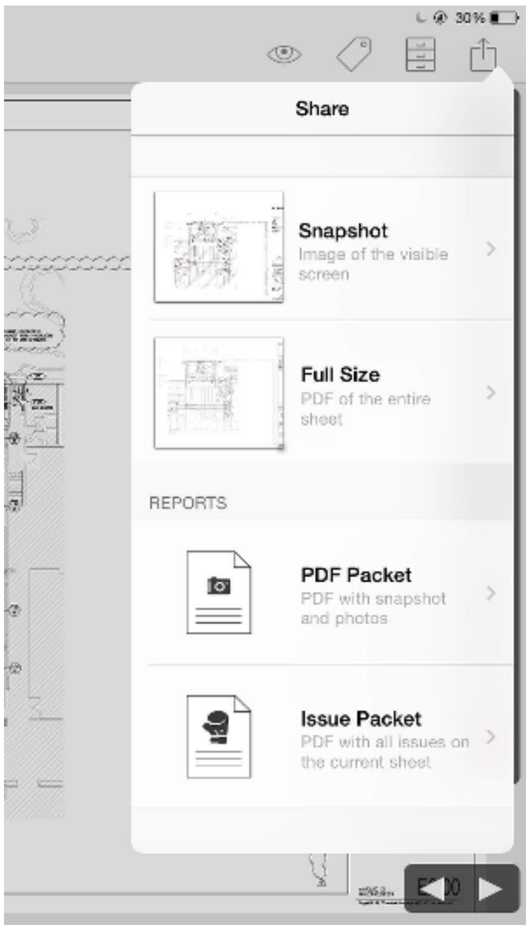
**Collaborators**

- Cannot upload drawings
- Cannot delete sheets
- Cannot delete projects
- Cannot add users
- Cannot archive and permanently delete master punch items
- Cannot push annotations to master
- Cannot edit sheet name, description, and version
- Cannot edit project tags
- Cannot attach documents
- Cannot share Annotation Layers
- Cannot lock or unlock RFI's
- Can ONLY assign issues when created on a mobile device (cannot create issues on the web)
- Can remove themselves from projects
- Can change issue's status to "Pending" or "In Review"
- Can only close self-assigned punch items
- Can create MyTags
- Can archive and permanently delete personal punch items

# Sharing from the iPad

To share a sheet from your device:
**1.** Tap the export icon in the top righthand corner of the screen.



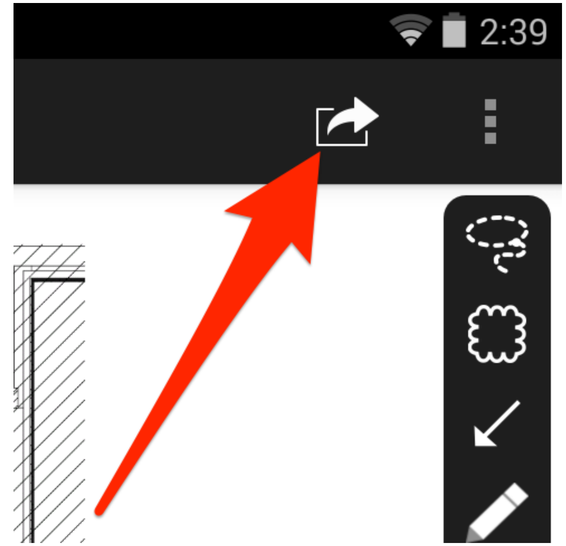



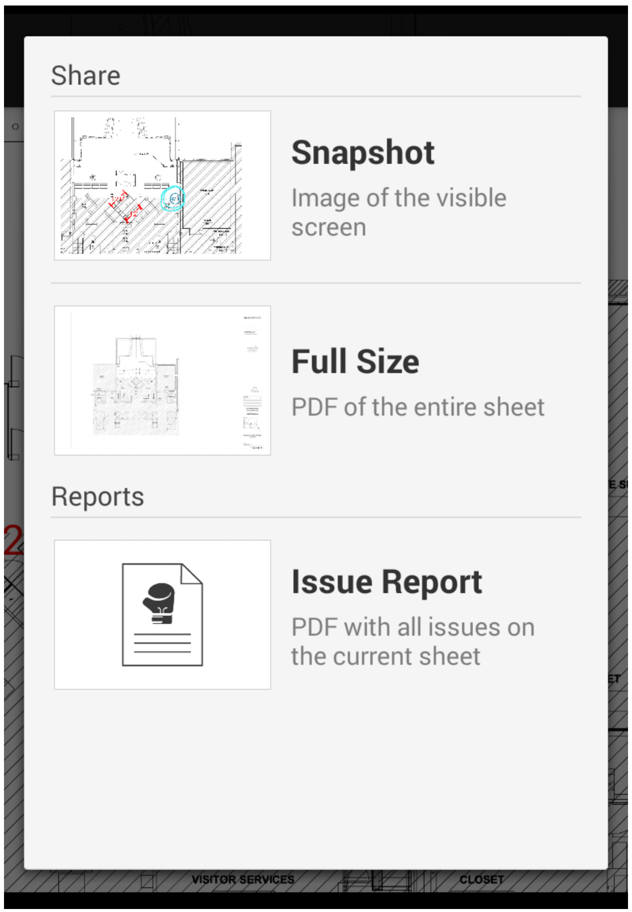

**2.** PlanGrid has 4 sharing options:

- **Snapshot** - send or save an image of the portion of the sheet you are viewing embedded in an email
- **Full Size PDF**- send a shareable link to a PDF of your entire sheet via email, great for downloading and printing
- **PDF Packet**- send or export a PDF of the portion of the sheet you are viewing, as well as any photos on the visible portion of the sheet
- **Issue Packet**- send a shareable link to a PDF Issue report for all the Issues stamps on the sheet

# Sharing from Android

**1.** Tap on the Share icon in the upper right corner of the screen




**2.** PlanGrid has 3 sharing options on Android:

- **Snapshot** - send or save an image of the portion of the sheet you are viewing embedded in an email
- **Full Size PDF**- send a shareable link to a PDF of your entire sheet via email, great for downloading and printing
- **Issue Packet**- send a shareable link to a PDF Issue report for all the Issues stamps on the sheet

# Exporting and Sharing from the Web

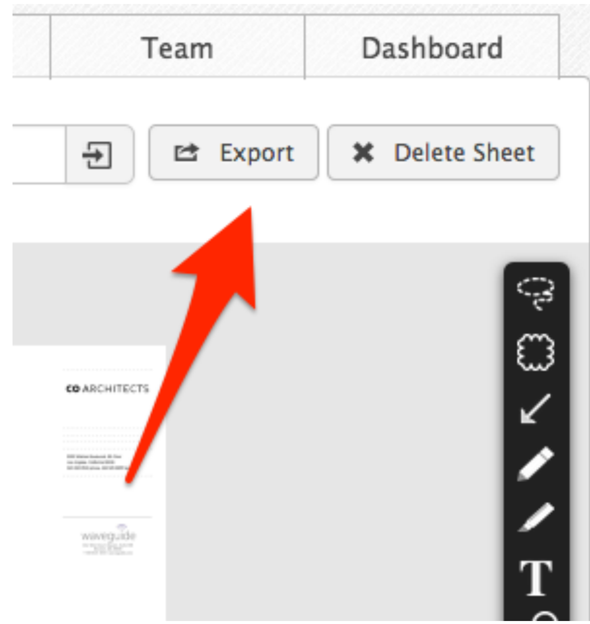
To share one sheet: *(For multiples, see p. 25)*

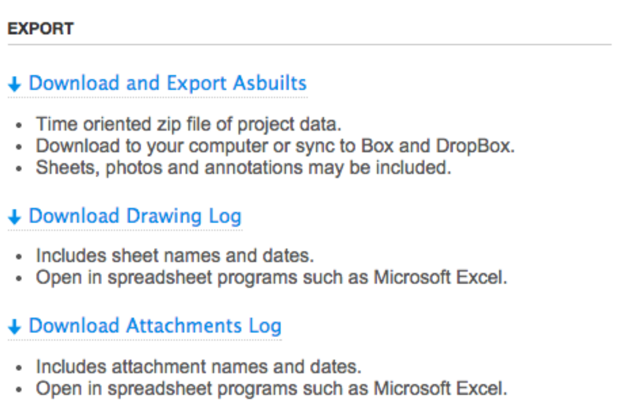
**1.** Click on the sheets you want to share.

**2.** Click on the "Share" button in the upper right corner

**3.** PlanGrid has 3 sharing options on the web:

- **Snapshot** - send or save an image of the portion of the sheet you are viewing embedded in an email
- **Full Size PDF**- send a shareable link to a PDF of your entire sheet via email, great for downloading and printing
- **Issue Packet**- send a shareable link to a PDF Issue report for all the Issues stamps on the sheet




To download or export **Asbuilts:**

**1.** Click on the "Settings" tab of your project.

**2.** Select " Download and Export Asbuilt"

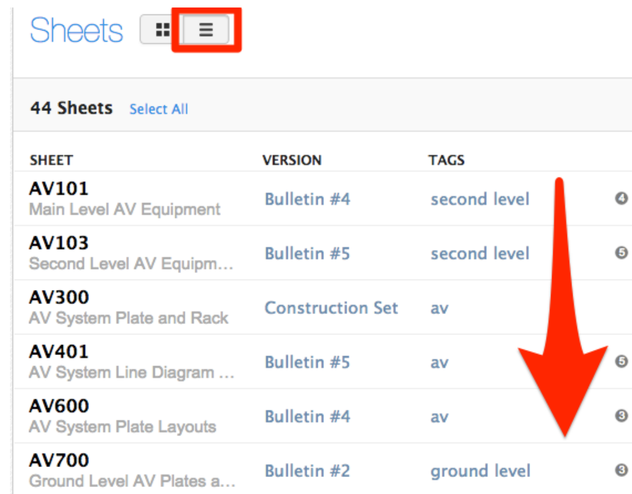
**3.** Check off the aspects (photos, annotations, etc.) and date range you would like to include and choose your method of delivery.

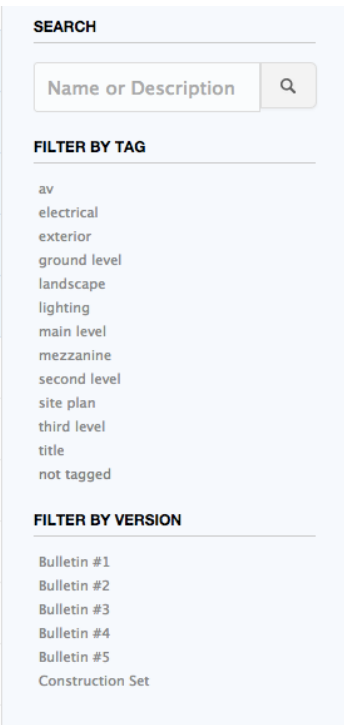
You can export it as a zip file to your computer, or sync it to your cloud storage account.

# Sharing Sheets and Making Changes from List View

You can download, share and make batch changes to multiple sheets from the Sheets tab.

**1.** Open the sheet tab and put it in List View by clicking the button that looks like 3 horizontal lines




**2.** You can narrow down the sheets you are viewing by selecting a tag or version, or combination of both. You can also search for specific sheets by sheet name or description.

**3.** Click and drag to highlight multiple sheets, or click "Select All" or "Select Filtered" to highlight all the sheets being shown.


**4.** To generate a shareable link to email, click "Share". That will generate a shareable link that can be copy +pasted into the body of any email.

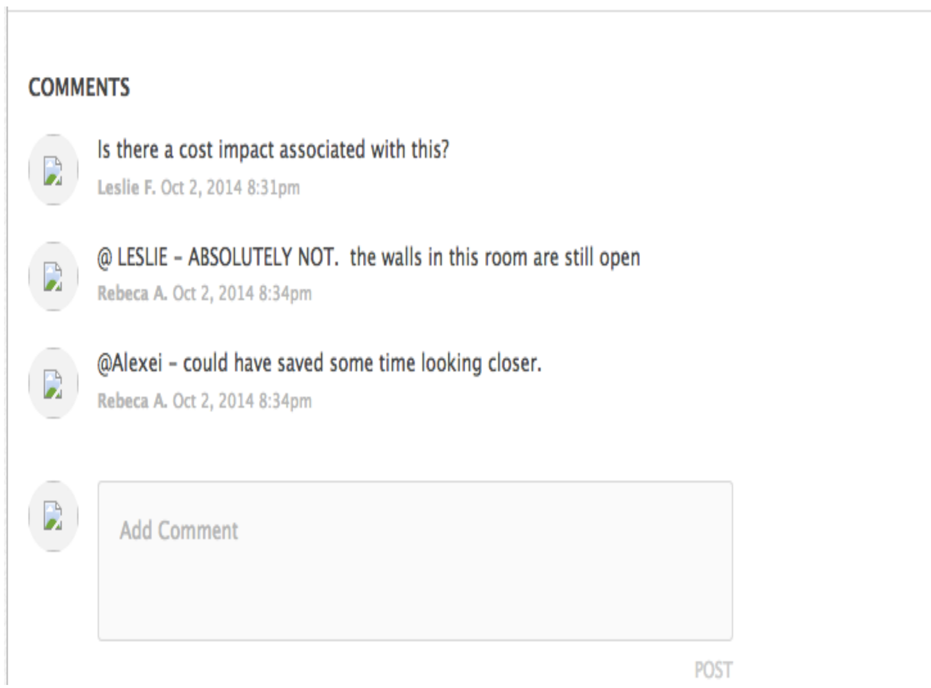
**5.** To download, click "Share", then choose "Download".

# Using PlanGrid Comments on the Web

Comments are available in Sheets, RFIs, Issues, and the Dashboard tab. All comments include a date and time stamp, as well as the name of the commenting team member. To leave a comment, simply click the Comment box to begin typing, then click "Post".

**In your Sheets:** From the Sheets tab, click to view your sheet. Scroll down to view the sheet details and to add your comments.

**In your Issues:** Open the Issues tab. Click the arrow associated with the particular Issue. Scroll down to view the Issue details.




**On your RFIs:** Open the RFI tab. Click Into the RFI. Scroll down, comments will be below the references.

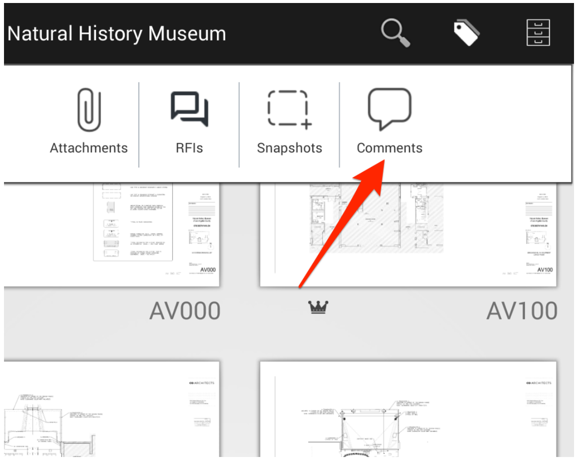
**In your projects Dashboard:** Open the Dashboard tab. Leave general comments about the project as a whole in your Dashboard tab.

# Using PlanGrid Comments Mobile Devices

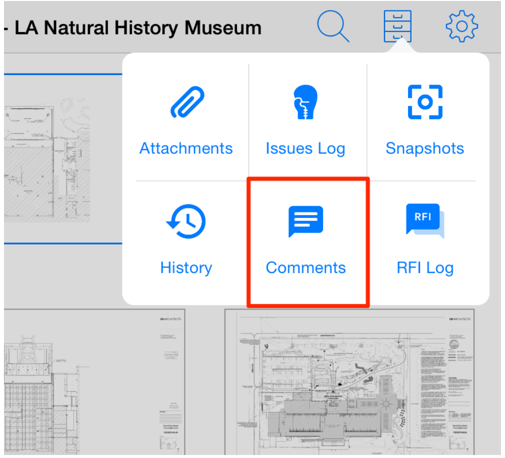
With PlanGrid Comments you can communicate directly with your team without having to leave the PlanGrid app. Leave a comment about a sheet, add pertinent information to an Issue, or have an ongoing conversation about the project at large.

**To View and Add Comments on your iOS or Android Device:**

1. Log into the project on your mobile device. To view or add comments about the project as a whole, tap the File Cabinet from grid view.
2. To add a comment, tap on "Tap to add comment", then click "Post" to post your comment for the whole team to see.
3. To access Comments about a sheet, tap to view the sheet, then tap the file cabinet.
4. For comments about specific Issues, tap the stamp to open the detail box.




**Android**




**iOS**

If comments have been added by another team member on your project, you will be notified a small badge on the file cabinet on both Android and iOS devices.

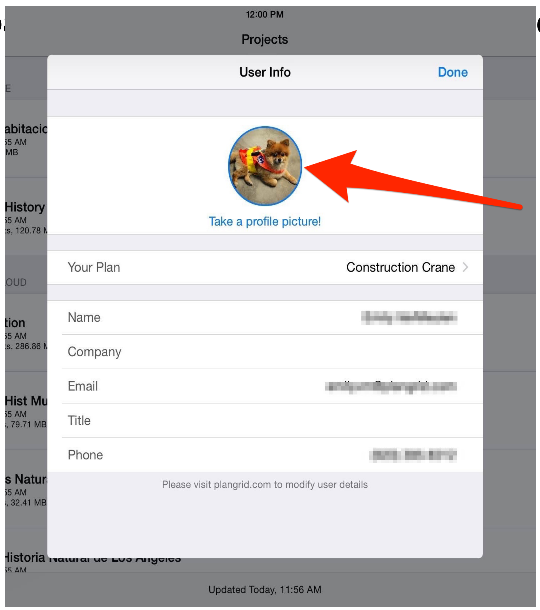
For project level comments you will see the badge on the file cabinet in **grid view.** For sheet level comments, you will see the badge when you **tap to open that sheet**.

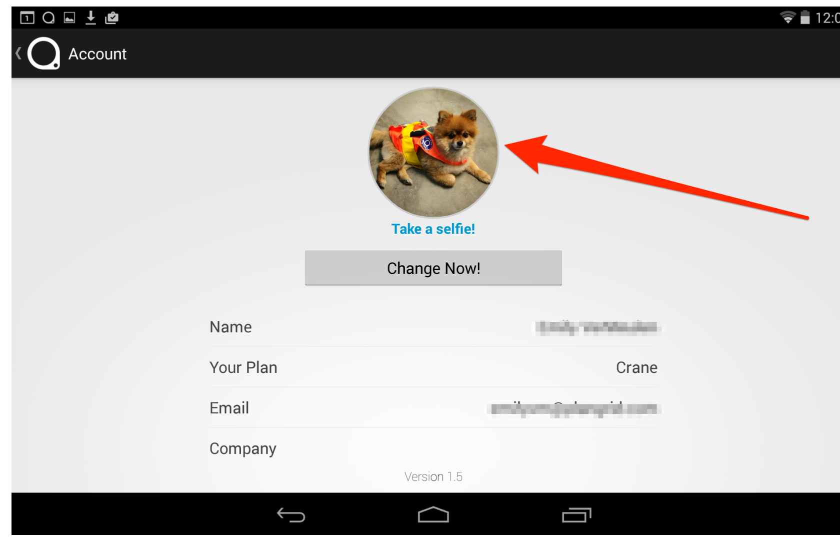
When you tap to open the file cabinet, you will see the number of unread comments noted in the comments icon.

# Adding a PlanGrid User Photo

Show your entire project team exactly who you are by uploading a user photo.  Your selfie will appear anytime you post a comment on a project, sheet or issue, and is visible to the entire project team on the website as well as the mobile app.
You can change the photo at any time simply by tapping the existing photo to open the camera or access the photo gallery.

**To uplo**d mobile app on your Apple or Android tablet or phone.



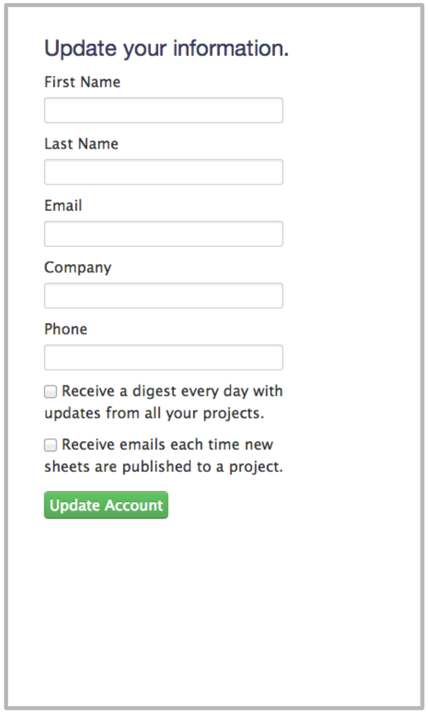

**On your iOS device:**

1. tap the icon in the upper right corner that looks like a person
2. Next, tap "User Info".
3. Tap the circle to snap a photo or choose one from your camera roll.

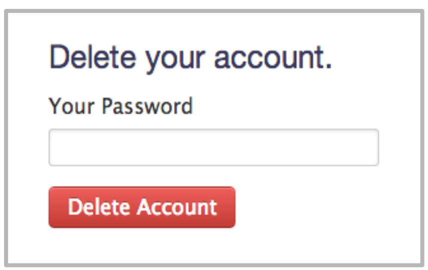
**On your Android tablet or phone:**

1. Tap the menu button in the upper right corner, then tap "User Info".
2. Next, tap the circle to snap a picture or upload an existing photo from your device's photo gallery.

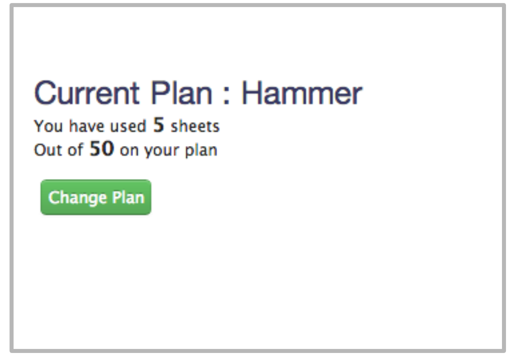
# Your Account



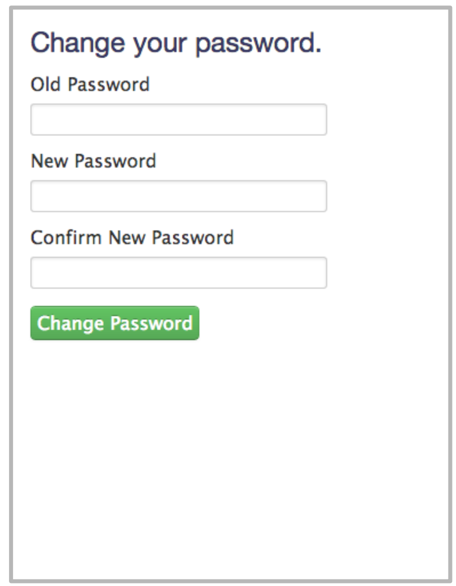

You can change almost every aspect of your PlanGrid account by clicking on your name at the top right hand side of the screen and selecting "My Account." **To update or change your information**, simply enter the correct information and click "Update Account." You can also select which email alerts you would like to receive.




**To delete your account**, type your password and click "Delete Account." You will be removed from all of your projects.




If you reach your sheet limit and would like **to upgrade your account**, click "Change Plan." You can then select that plan that will better meet your needs.



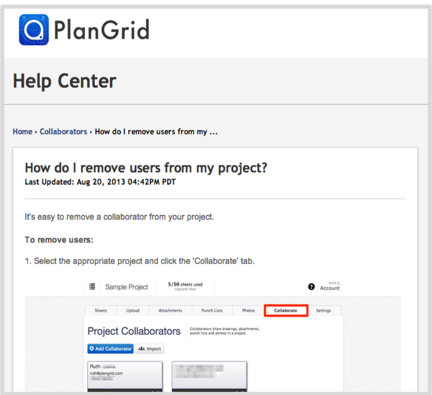

**To change your password:**
**1.** Type your old password.
**2.** Type and confirm your new password.
**3.** Click "Change Password."

If you forgot your password, click "Forgot my password" from the PlanGrid sign in page. An email will be sent to you with instructions on how to reset your password.

# Help Resources

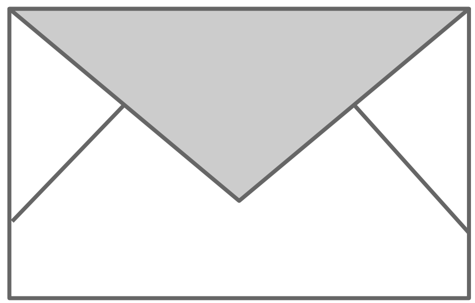
Help Center:

help.plangrid.com




Email:

support@plangrid.com



Live chat:

M-F, 4am - 5pm PST
www.plangrid.com